

OREGON NURSERY

and

GREENHOUSE

SURVEY

2004

2004

OREGON NURSERY

and

GREENHOUSE

SURVEY

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Oregon Field Office

National Agricultural Statistics Service

United States Department of Agriculture

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United States
Department
Of Agriculture



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in cooperation with

FORWARD

September 2005

The release of the **2004 Oregon Nursery and Greenhouse Survey** results represents the fifteenth year of documenting through statistics the progress of Oregon's # 1 agricultural industry. Nursery and greenhouse sales climbed to \$ 844 million in 2004, up 8 percent from the previous year, demonstrating that the industry continues to do an outstanding job of growing and marketing high quality nursery stock and materials. This growth continues despite the challenges of truck shortages, rising fuel, transportation, and labor costs, sometimes burdensome regulations, and competition for land. The industry is a key generator of revenue for the State, with in excess of 75 percent of sales coming from outside Oregon.

Oregon's top five producing counties Clackamas, Washington, Marion, Yamhill, and Multnomah are in or near the Portland metropolitan area. The nurseries and greenhouses in these five counties represent 86 percent of the total value of production, providing local employment and beautifying the urbanized landscape.

Container sales continue to dominate the product categories, accounting for 41 percent of the sales for all product types; this share is up 3 percent from 2003. Growth in sales of container plants accounted for 72 percent of the \$65 million increase realized by the industry in 2004.

We would like to thank the many Oregon nurseries and greenhouses, the Oregon Association of Nurseries, the Oregon Department of Agriculture, our crew of field interviewers, and others who provide information and support for this important annual effort. Access to accurate and timely information is critical to the continued success of this vital sector of Oregon agriculture.

Sincerely,

Janice A. Goodwin
Director

The National Agricultural Statistics Service is an agency of USDA's Resource, Education, and Economics mission.

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2004 Oregon nursery product sales set another record.

Oregon's horticulture industries continued to grow in 2004 with another record high sales value of \$844 million for nursery and greenhouse products. This was the fifteenth year of this survey and the fourteenth year of record sales. Sales in 2004 climbed 8 percent above 2003 and were over 2 times the sales of 1995. The horticulture industry continued to solidify its place above all other Oregon agricultural commodities, claiming nearly 21 percent of the total value of agricultural production. Cattle, with a value of \$503 million, ranked second, while all hay and all milk claimed third and fourth places with sales of \$382 million and \$363 million, respectively.

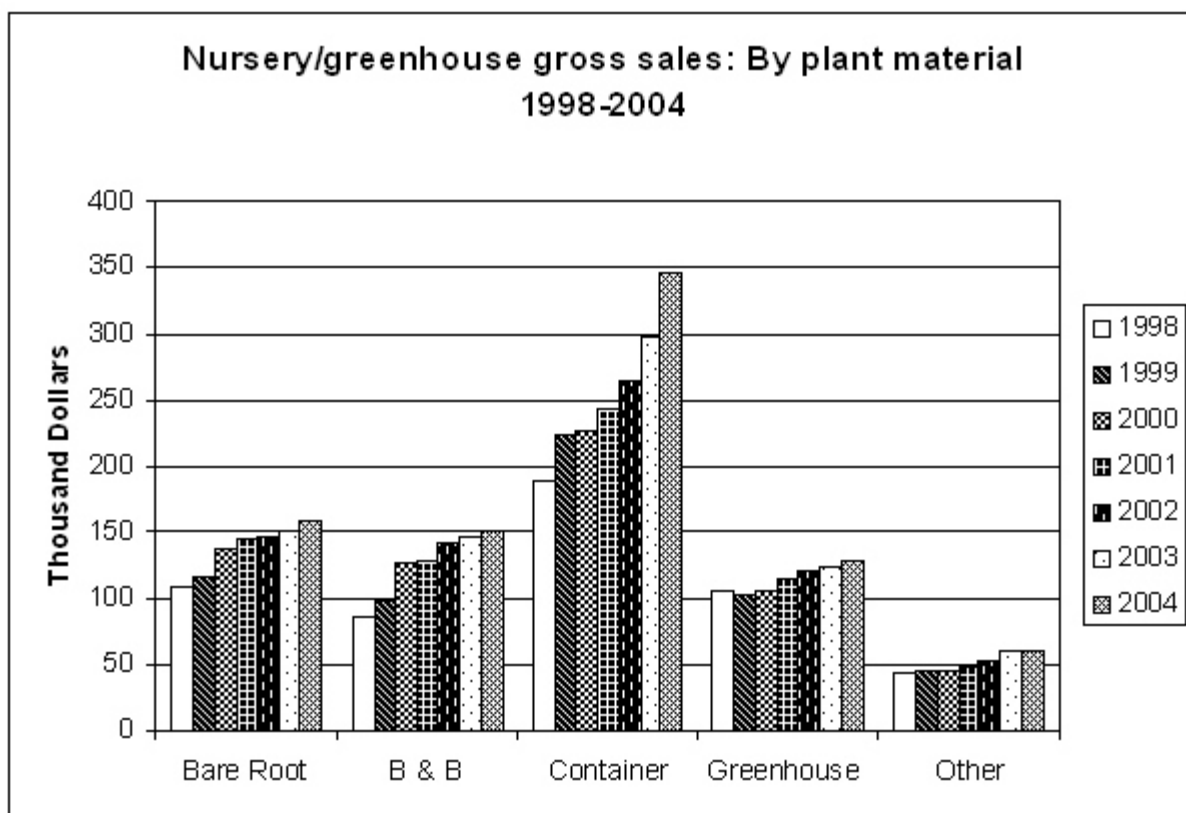
Seventy-two percent of the total \$65 million sales increase this year was in Container sales, which increased 16 percent over last year, while Bare Root products gained 6 percent. Each category of plant material sales was higher in 2004 than in 2003, except for the other product category which remained the same as the previous year.

Gross sales, when broken down by sales size groups, showed increases in all but one group. The largest size group, 2+ million, increased 12 percent or \$67.3 million over 2003. This increased value is more than the total increase because the \$500,000 to \$2 million sales size group was down 3 percent to 5.1 million from last year. This size group was down in sales value because many of these firms increased sales and moved into the 2+ million size group.

(continued on page 3)

Nursery/greenhouse gross sales: By plant material 1998 - 2004

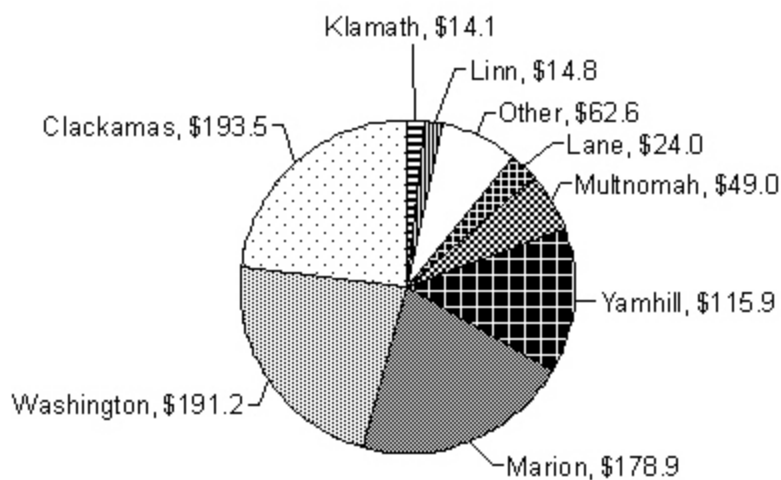
Plant material	1998	1999	2000	2001	2002	2003	2004	<u>2004</u> <u>2003</u>
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent change</i>
Bare Root	109,700	116,300	136,700	145,100	147,500	150,100	159,400	106
B & B	85,500	97,500	127,700	129,100	142,100	147,400	151,000	102
Container	188,500	223,100	226,300	243,100	265,100	298,300	345,300	116
Greenhouse	105,900	103,100	106,600	114,700	120,100	124,300	129,400	104
Other	42,400	44,000	44,700	48,000	52,200	58,900	58,900	100
Total	532,000	584,000	642,000	680,000	727,000	779,000	844,000	108



Number of operations, acreage, and gross sales by county, 2002 - 2004

	Number of operations	Acreage	Gross sales			
	2004	2003 ^{1/}	2002	2003	2004	2004/2003
	<i>Number</i>	<i>Acres</i>	<i>1,000 Dollars</i>	<i>1, 000 Dollars</i>	<i>1, 000 Dollars</i>	<i>Percent change</i>
Benton	46	330	1,400	1,500	1,800	120
Clackamas	453	12,750	166,400	175,500	193,500	110
Curry	21	480	4,600	4,750	4,250	89
Deschutes	46	310	3,100	3,550	3,600	101
Douglas	49	580	3,200	3,850	3,750	97
Jackson	75	120	3,100	3,100	3,150	102
Josephine	43	130	2,400	2,400	2,500	104
Klamath	16	1,760	10,100	11,350	14,100	124
Lane	144	600	17,900	20,950	24,000	115
Lincoln	19	160	2,400	2,850	2,700	95
Linn	81	580	9,500	11,650	14,800	127
Marion	357	12,200	165,600	174,150	178,900	103
Multnomah	176	3,550	43,600	45,100	49,000	109
Polk	48	1,250	9,200	10,950	10,300	94
Umatilla	12	680	4,400	5,300	6,800	128
Washington	251	7,260	157,500	163,750	191,200	117
Yamhill	99	6,400	103,600	106,800	115,900	109
Other ^{2/}	137	1,260	19,000	31,500	23,750	75
Total	2,073	50,400	727,000	779,000	844,000	108

Nursery/greenhouse gross sales by county, Oregon - 2004
Oregon \$844 million



1/ Not collected in 2004. 2/ Contains counties with less than 1 million dollars of sales and other counties that were combined to avoid disclosure.

* **Other** : Polk \$10.3, Umatilla \$6.8, Curry \$4.3, Douglas \$3.8, Deschutes \$3.6, Jackson \$3.2, Lincoln \$2.7, Josephine \$2.5, Benton \$1.8, Other Misc. Counties \$23.8

Oregon Nursery/Greenhouse 2004
(continued from page 1)

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Firms with sales over \$2 million made up 72.4 percent of all Oregon sales, and the total number of firms in this group increased 8 firms to a total of 84 firms.

Oregon's top four counties of production, Clackamas, Washington, Marion, and Yamhill had with sales of \$193.5 million, \$191.2 million, \$178.9 million and \$115.9 million, respectively. In total, these four counties accounted for 81 percent of all the sales. When Multnomah county's sales of \$49.0 million is included, the total value of production in the top five counties account for 86 percent of total production. Clackamas county is still the major production area, but Marion county -- which has been the second largest county of production -- was replaced by Washington county this year. Washington county sales were only 2.3 million below Clackamas county and increased \$27.5 million above last year. Given the number of growers and acres in production in Clackamas, Washington, and Marion, counties, any of these three could be the number one producer next year.

Gross sales, by sales value 2000-2004

Sales size group	2000	2001	2002	2003	2004	<u>2004</u> <u>2003</u>
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>Percent change</i>
Less than \$20,000	8,800	6,300	6,100	6,400	7,700	120
\$20,000 - \$99,999	15,800	16,100	18,000	18,100	18,900	104
\$100,000 - \$199,999	14,600	14,000	15,300	15,900	16,700	105
\$200,000 - \$499,999	37,900	44,400	41,600	45,200	45,100	100
\$500,000 - \$1,999,999	130,200	130,500	149,500	149,400	144,300	97
More than \$2,000,000	434,700	468,700	469,500	544,000	611,300	112
Total	642,000	680,000	727,000	779,000	844,000	108

Data collection

The 2004 Oregon Nursery and Greenhouse Survey was designed to collect data on all commercial nurseries, greenhouses, and producers of other plant material, such as roses, holly, bulbs, sod, cut flowers, dried flowers, etc. in the State. A stratified random sample of 752 names was selected from the State of Oregon's list of licensed nurseries and greenhouses for 2004. They were classified into six broad size groups based on sales volume. The Oregon Agricultural Statistics Service's floriculture survey was used to supplement the list for those firms who are not required to have a State license.

Questionnaires were mailed to the sampled names on June 13, 2005, followed by a second request on July 7. All non-respondents were phoned or visited from July 27 to August 18. Cooperation was excellent with 92 percent of the sampled names participating in the survey. Data for minor counties and items were combined with other totals to avoid disclosure of individual operations.

The sample design was developed by the National Agricultural Statistics Service. Kent Hoddick of the Oregon Staff has been the survey coordinator of the Oregon Nursery and Greenhouse program since its inception in 1991.

Number of operations and survey sampling 2003 & 2004

Sales size group	Total number of operations		Operations in sample	
	2003	2004	2003	2004
Less than \$20,000	1,182	1,194	112	132
\$20,000 - \$99,999	389	396	137	151
\$100,000 - \$199,999	112	115	90	109
\$200,000 - \$499,999	136	140	115	132
\$500,000 - \$1,999,999	149	144	149	144
More than \$2,000,000	76	84	76	84
Total	2,044	2,073	679	752

Wages and number of workers up ^{1/}

The number of workers employed increased 6 percent from 2001 to a total of 21,600. Each sales size group reflected part of that increase except the "\$200,000-\$499,999" size group, which dropped 400 workers, a decline of 22 percent from the 2001 survey. While the total wages paid rose 18 percent to a total of \$275.2 million, the State average wage paid to workers only rose by 11.8 percent or to \$12,741 dollars. Full time worker numbers continued upward, reaching 10,000 for 2003. Seasonal worker numbers, after two surveys of declining numbers, increased by 7 percent to 11,600 workers for 2003. Both seasonal and full time worker numbers declined for the "\$200,000-\$499,999" sales size group since the 2001 survey.

Number of workers employed in the nursery/greenhouse industry and gross wages paid - 2003

Sales size group	Full time	Seasonal	Total workers	Total wages	Average wages per worker
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Dollars</i>	<i>Dollars</i>
Less than \$20,000	60	800	860	1,210,000	1,407
\$20,000 - \$99,999	200	1,200	1,400	5,390,000	3,850
\$100,000 - \$199,999	240	600	840	5,020,000	5,976
\$200,000 - \$499,999	600	800	1,400	15,500,000	11,071
\$500,000 - \$1,999,999	2,200	3,300	5,500	58,720,000	10,676
More than \$2,000,000	6,700	4,900	11,600	189,360,000	16,324
Total	10,000	11,600	21,600	275,200,000	12,741

^{1/} Data not collected for 2004; the number of workers and wages are collected every other year.

Number of workers, wages and number of operations 1997 - 2003

	1997	1999	2001	2003	<u>2003</u> <u>2001</u>
	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Number</i>	<i>Percent change</i>
Seasonal workers	12,750	12,200	10,850	11,600	107
Full time workers	8,050	9,000	9,550	10,000	105
Total workers	20,800	21,200	20,400	21,600	106
Total wages (\$)	178,870,000	201,170,000	232,557,000	275,200,000	118

Average wages per worker (\$)	8,600	9,489	11,400	12,741	112
Number of operations	2,040	2,185	2,139	2,044	96

Oregon Nursery/Greenhouse 2004

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DESTINATIONS OF OREGON NURSERY PRODUCT SALES SHIFTING

Percentage wise, the following destinations showed the strongest gains from the last destination survey in 1999: Other Western States - up 46 percent (\$19.2 million); Upper Midwest - up 67 percent (\$52.9 million); Gulf States - up 39 percent (\$6.9 million); Northeast States - up 48 percent (\$39.4 million); and Eastern Canada - up 146 percent (\$11.1 million). All other destinations also increased but at lesser percent changes. Of course, Oregon remained the largest destination, increasing by \$30.2 million dollars in sales delivered over 1999. Destination sales as a percent of total Oregon sales produced showed increased sales in Other Western States, Upper Midwest, Gulf States, Northeast States, and Eastern Canada, while all other regions declined in sales value share. Virtually all regions showed strong gains in container sales delivered over 1999. Most regions showed good gains in Balled & Burlapped deliveries except Upper Midwest - no change, Atlantic States - declined, Northeast States - declined, and Eastern Canada - declined. Bare root deliveries made modest gains in all regions except Oregon showed a slight decline. The Upper Midwest increased about 75 percent in deliveries for bare root material. Greenhouse and Other plant materials made good gains overall.

Destination of gross sales by Oregon plant material, 1995, 1999, 2003 ^{8/}

Destination	Plant material type								
	Bare root			B & B			Container		
	1995	1999	2003	1995	1999	2003	1995	1999	2003
	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>	<i>1,000 dollars</i>
Oregon	19,420	20,610	19,000	15,690	18,560	24,780	30,240	42,280	53,380
Washington	8,185	8,480	9,000	8,850	9,850	11,920	15,090	25,860	31,930
California	4,625	6,390	8,830	2,346	4,060	5,950	8,150	16,900	17,770
Other western States ^{1/}	3,225	4,670	8,000	8,085	8,560	15,330	13,080	25,510	31,030
Upper Midwest ^{2/}	20,130	21,560	37,660	9,490	15,160	23,570	31,620	36,060	62,480
Gulf States ^{3/}	4,800	4,690	5,910	1,315	2,680	3,470	3,660	6,450	10,340
Atlantic States ^{4/}	9,375	24,400	27,100	5,937	12,860	21,150	11,300	30,950	32,840
Northeast States ^{5/}	9,345	21,050	24,650	13,450	21,900	36,060	24,110	33,160	49,970
Western Canada ^{6/}	2,070	2,770	2,300	1,654	1,750	1,950	6,260	3,210	3,810
Eastern Canada ^{7/}	845	1,220	6,950	760	2,120	3,220	4,260	2,440	4,590
Foreign Countries	880	460	700	223	--	--	330	280	160
Total	82,900	116,300	150,100	67,800	97,500	147,400	148,100	223,100	298,300

1/ Other western States include MT,ID,WY,NV,UT,AZ,NM,CO,AK,HI.

2/ Upper Midwest include ND,SD,NE,KS,MN,IA,MO,WI,IL,MI,IN,OH,KY.

3/ Gulf States include OK,TX,AR,LA,TN,MS,AL.

4/ Atlantic States include MD,DE,WV,VA,NC,SC,GA,FL.
5/ Northeast States include ME,NH,VT,MA,CT,RI,NY,PA,NJ.
6/ Western Canada include BC,AB,SK,MB.
7/ Eastern Canada includes all other provinces.
8/ Not collected for 2000, 2001, 2002, or 2004.

Oregon Nursery/Greenhouse 2004

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Destination of gross sales by Oregon plant material, 1995, 1999, 2003^{8/} (continued)

Destination	Plant material type									2003 1999	Percent of total sales by destination
	Greenhouse			Other			Total				
	1995	1999	2003	1995	1999	2003	1995	1999	2003		
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	Percent	Percent
Oregon	47,415	60,680	73,480	13,670	17,450	19,130	126,435	159,580	189,770	119	24.3
Washington	11,275	14,920	18,260	4,010	2,320	4,490	47,410	61,430	75,600	123	9.7
California	10,160	9,700	9,340	5,630	9,670	12,080	30,911	46,720	53,970	116	6.9
Other Western States ^{1/}	1,710	2,150	4,130	1,140	1,030	2,640	27,240	41,920	61,130	146	7.8
Upper Midwest ^{2/}	4,325	3,680	4,610	3,350	2,810	3,870	68,915	79,270	132,190	167	17.0
Gulf States ^{3/}	1,600	2,030	1,670	1,900	1,890	3,220	13,275	17,740	24,610	139	3.2
Atlantic States ^{4/}	1,475	3,260	2,310	4,020	2,750	3,380	32,107	74,220	86,780	117	11.1
Northeast States ^{5/}	2,150	3,350	4,940	2,320	2,290	5,520	51,375	81,750	121,140	148	15.6
Western Canada ^{6/}	2,015	2,060	2,450	450	360	910	12,449	10,150	11,420	113	1.5
Eastern Canada ^{7/}	1,025	1,090	2,410	180	690	1,460	7,070	7,560	18,630	246	2.4
Other Foreign Countries	350	180	700	30	2,740	2,200	1,813	3,660	3,760	103	.5
Total	83,500	103,100	124,300	36,700	44,000	58,900	419,000	584,000	779,000	133	100

1/ Other western States include MT,ID,WY,NV,UT,AZ,NM,CO,AK,HI.
2/ Upper Midwest include ND,SD,NE,KS,MN,IA,MO,WI,IL,MI,IN,OH,KY.
3/ Gulf States include OK,TX,AR,LA,TN,MS,AL.
4/ Atlantic States include MD,DE,WV,VA,NC,SC,GA,FL.
5/ Northeast States include ME,NH,VT,MA,CT,RI,NY,PA,NJ.
6/ Western Canada include BC,AB,SK,MB.
7/ Eastern Canada includes all other provinces.
8/ Not collected for 2000, 2001, 2002, or 2004.

Number of operations by sales value, 1998 - 2004

Sales size group	Number of Operations						
	1998	1999	2000	2001	2002	2003	2004
Less than \$20,000	1,342	1,396	1,324	1,337	1,375	1,182	1,194
\$20,000 - \$99,999	337	356	343	362	353	389	396
\$100,000 - \$199,999	129	121	103	98	106	112	115
\$200,000 - \$499,999	113	116	126	138	136	136	140
\$500,000 - \$1,999,999	118	135	137	134	142	149	144
More than \$2,000,000	43	62	69	70	71	76	84
Total	2,082	2,185	2,102	2,139	2,183	2,044	2,073

Gross sales and operations trends 1990-2004

Year	Gross Sales <i>1,000 dollars</i>	% Change From Last Year	Number of Operations	Number of Firms with sales over \$2 million
1990	315,000	1/	1/	1/
1991	341,000	108	1,704	1/
1992	345,000	101	1,900	1/
1993	347,000	101	1,986	1/
1994	385,000	111	1,979	32
1995	419,000	109	1,905	38
1996	448,000	107	1,983	41
1997	492,000	110	2,040	40
1998	532,000	108	2,082	43
1999	584,000	110	2,185	62
2000	642,000	110	2,102	69
2001	680,000	106	2,139	70
2002	727,000	107	2,183	71
2003	779,000	107	2,044	76
2004	844,000	108	2,073	84

Oregon Nursery/Greenhouse 2004
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FAX: 326-2549 or 1-800-731-7011

7

OREGON NURSERY AND GREENHOUSE SURVEY 2004

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Dear Nursery/Greenhouse Grower:

Please take a few minutes to complete the annual Nursery and Greenhouse Survey that is the only source of measuring annual growth and change of Oregon's major agricultural industry. The nursery/greenhouse report will be released in August 2005 and is used extensively by your industry, universities, the legislature and local governments for informed decision making concerning issues affecting both the industry. Thank you for your help.

Sincerely,

Janice A. Goodwin
Director

Please make corrections to name, address and zip code if necessary.

SECTION 1 - INTRODUCTION

1. Did you produce, sell, or have growing any nursery or greenhouse crops (including container grown), bulbs, sod, bedding plants, cut flowers, holly and dried flowers, etc. during 2004?

☐ **YES** - Please go to Section 2.

☐ **NO** - Please go to Section 3 on the back page.

SECTION 2 - GROSS SALES VALUE

2. What were your gross (invoice) sales from your nursery and greenhouse operation for each of the following plant material categories, and in total 2004? If calendar year data are not available, please use the most recent fiscal Year period. (Exclude plant material purchased for immediate resale.)

- a. Bare Root
- b. Balled and Burlapped
- c. Container
- d. Greenhouse
- e. Other Nursery Plant Materials (include sod, bulbs, tubers, holly, cut greens, etc.)
- f. TOTAL (Should equal a+b+c+d+e)

E

2004 GROSS SALES (IN DOLLARS)	
311	
312	
313	
314	
315	
310	

Continue

SECTION 2 - NURSERY ACRES OPERATED (cont.)

3. List the Oregon county or counties where your nursery or greenhouse acreage is located. If your acreage is in more than one county, list each county separately, with the percent of gross sales by county. (Exclude acreage located in other States.)

COUNTY		ACRES	PERCENT OF GROSS SALES	OFFICE USE
_____ S	+	611	621	601
_____	+	612	622	602
_____ A	+	613	623	603
_____	+	614	624	604
TOTAL (Acres should equal total in item 2g on page 1)	=	615	100%	

SECTION 3 - CHANGE IN OPERATOR

4. Has this operation been ***sold, rented out*** or turned over to someone else?

☐ **YES** - Please identify the new operator.

☐ **NO** - Please check one reason which applies.

Name: _____

P

☐ Retail sales of only.

Address: _____

☐ New operation with no 2003 sales.

City, State _____ Zip _____

☐ Other [*Explain*] _____

L

☐ Landlord

Prepared by: _____ Telephone: _____ Date: _____

E

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